



# News

2/2010



# Letter

Observatory for Sociopolitical Developments  
in Europe

## Caregiver leave models in European comparison

Even though long-term care in the EU is provided largely by relatives, it is only in the last few years that their situation and needs have received much political attention in either the member states themselves or in Europe at large. There are currently some 19 million informal caregivers in Europe.<sup>1</sup> One of the reasons that family care has been shifting into the closer focus of public discussion is the growing awareness of how much the pool of potential informal carers has shrunk as a result of demographic change and increasing female employment. Even now, half of caregiving relatives are gainfully employed and thus forced to depend on external circumstances allowing them to better combine their work with their caregiving activity.<sup>2</sup>

If we compare existing arrangements in the various European member states, we see clearly that there are significant differences in the organisation of caregiving and in the support available to caregivers. The differences are particularly clear between Northern

European countries, which have a long tradition of public care services, and Southern and Eastern European countries, where support systems are more fragmented and forms of family support more prevalent. In addition to short and longer-term leave models allowing caregiving relatives, who work full- or part-time to be released from their employment obligations for specific periods, caregiving relatives also have access to support in the form of financial assistance, benefits in kind, and special mind- ing services such as short-term in- stitutional care or daycare as well as information and seminars. The immediate reason for the Observatory's interest in the issue of caregiver leave models in European comparison is the bill expected to be presented to the German Bundestag on "family car- egiver leave". The intention of the new caregiver leave model is that employees should be able to care for relatives in their home environ- ment and at the same time have financial security and not lose their jobs.<sup>3</sup>

With European society ageing and social security systems already heavily burdened, the topic of compatibility of work and long- term care is also perceived as a significant issue at European level, where various approaches to the problem are being discussed. In its resolution of 7 September 2010 on the role of women in an ageing society,<sup>4</sup> the European Parliament explicitly favours the introduction of caregiver leave models. It calls on the member states to "(...) intro- duce new types of leave that make it possible to take paid leave for caring duties other than parental leave, and promote a more equal division of unpaid care between women and men (...)".

A comparison of the various mod- els in place in European member states for short or longer-term leave for providing care to close relatives shows that these models are a new development and that many of them involve a number of restrictions. As a rule they are lim- ited in time (maximum two years), and only some of them offer fi- nancial support. The comparison reveals that there are two basic models: those with shorter and with longer leave periods. In 25 EU member states, employees have the right to stay away from work to care for relatives for short peri- ods of time (a few days to several weeks).<sup>5</sup> Longer-term leave options for caregiving (from a few weeks to two years) exist in Austria, Ger- many, Belgium, the Netherlands, Italy, Ireland and Spain. Moreover, some countries have flexible work- ing time models (Austria, Nether- lands, United Kingdom, Ireland, Spain), life working time accounts or time credit systems (Belgium, Netherlands) that can also be used to care for relatives. In these mem- ber states, longer leave periods are not explicitly defined as being for

## Editorial

DEAR READER,

IN MAY 2010, THE GERMAN MINISTER FOR FAMILIES AND SENIOR CITIZENS, KRISTINA SCHRÖDER, REKINDLED THE GERMAN DEBATE ON THE COMPATIBILITY OF WORK AND CARE RESPONSIBILITIES WITH HER REFORM PROPOSAL ON "FAMILY CAREGIVER LEAVE". AT EUROPEAN LEVEL TOO, THE EU 2020 STRATEGY FOR SMART, SUSTAINABLE AND INCLUSIVE GROWTH HAS TRIGGERED DISCUSSION ON HOW WORKING TIME MODELS CAN BE ADAPTED TO THE RAPIDLY CHANGING DEMOGRAPHIC CONDITIONS.

THE SPECIAL TOPIC OF THE PRESENT NEWSLETTER OF THE OBSERVATORY FOR SOCIOPOLITICAL DEVELOPMENTS IN EUROPE IS THEREFORE "CAREGIVER LEAVE".

THE DISCUSSION ABOUT CAREGIVER LEAVE MODELS IN THE EU OFTEN NAMES THE BELGIAN SYSTEM AS A GOOD PRACTICE EXAMPLE. IN THEIR ARTICLE, JESSI VANDEWEYER AND IGNACE GLORIEUX OF VRIJE UNIVERSITEIT BRUSSEL EXTENSIVELY DESCRIBE THE "CAREER BREAK SYSTEM" IN PLACE IN BELGIUM AND THE OBJECTIVES THE SYSTEM PURSUES. IN THEIR ARTICLE ABOUT "CAREGIVER LEAVE MODELS IN EUROPEAN COMPARISON", SABRINA STULA AND ANNETTE ANGERMANN OF THE OBSERVATORY PRESENT THE GREAT VARIETY OF CONCEPTS EXISTING IN EUROPE ON THIS ISSUE. ROBERT ANDERSON, PRESIDENT OF THE EUROPEAN UMBRELLA ORGANISATION "EUROCARERS" AND HEAD OF UNIT AT THE EUROPEAN FOUNDATION FOR THE IMPROVEMENT OF LIVING AND WORKING CONDITIONS, EXPLORES THE EUROPEAN DIMENSION OF THE PROBLEM.

THE LAST PAGE OF THE NEWSLETTER PRESENTS A SELECTION OF BACK- GROUND INFORMATION ON THIS ISSUE'S TOPIC OF "CAREGIVER LEAVE".

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the care of elderly relatives but for the care of family members of any age who are ill. The **Belgian caregiver model**, for instance, allows leave of up to twelve months (or working time reduction for 24 months) if a family member is seriously ill; salary continues to be paid in the same manner as in parental leave.<sup>6</sup> **Ireland** offers a variety of forms and possible combination to support caregiving relatives. One interesting aspect of this model is the option of leave intended explicitly for the benefit of part-time employees. In **Spain** there is also the possibility of taking up to two years' leave – unpaid, however. Other innovative approaches are extending the entitlement to caregiver leave beyond the immediate context of the family (United Kingdom) or models for flexible working time organisation during the caregiving period (particularly in the United Kingdom and Netherlands).

There are few national or European reports on how existing models are being used. National evaluations show, however, that few people are taking advantage of the existing systems. This is partly because of the structure of the models (lack of financing options, restriction of entitlement to full-time employees). On the other hand, it is also because caregiving relatives tend not to see themselves as belonging to a group in need of support. One exemption here is the **United Kingdom**, where there is a strong interest group of caregiving relatives with an assertive public profile. Another reason for the low level of recourse to systems is that caregivers often hesitate to appear

in this role, particularly vis-à-vis their employers. They are worried that awareness of their caregiving responsibility would mean a loss of competitive advantage in the labour market.<sup>7</sup>

This overview presents many European caregiver leave models with a variety of approaches on how caregiving relatives are supported in the various EU member states. In order to better understand the situation of caregiving relatives in the member states, it would be necessary in a second step to take a closer look at the framework conditions in which they operate. The experience of Northern European countries, where the issue of adequate support structures has been the subject of public debate for years now, shows that particularly the possibilities of short-term care and daycare, support groups and education are important elements of support for informal caregivers.

ANNETTE ANGERMANN,

DV e.V.

SABRINA STULA, DV e.V.

1 Most informal family care (80-85%) is provided by women. (Meichenitsch, Katharina/Österle, August (2008): Pflegesysteme in Europa – Zwischen steigendem Bedarf und restriktiven Budgets. In: Kontraste (5), p. 4-6.

2 Anderson, Robert (2009): Dependent persons in the European Union: who cares about family carers?, conference paper, (accessed on 22 September 2010).

3 cf. Newsletter background information page 4 P7\_TA(2010)0306

4 These are the so-called "emergency days" (Belgium, Ireland) or days that can be claimed for short-term care of family members who are ill (Netherlands, Austria, Spain, Italy).

5 cf. Newsletter article by Jessie Vandeweyer and Ignace Glorieux, page 3.

6 Barkholdt, Corinna (2007): Wirkungsvolle Entlastung von Pflegenden – Was können wir aus anderen europäischen Ländern lernen? In: Bundestagsfraktion Bündnis 90/Die Grünen (2007): Pflege und Erwerbstätigkeit. Documentation of the public specialist debate held on this topic on 21 June 2006 at Jakob-Kaiser-Haus of the German Bundestag, p. 19–22.

## Guest Column

### Arrangements in the EU for workers with care responsibilities for sick or dependent relatives

About 80% of time spent caring for people with a disability or for older dependent persons is provided by informal carers from among family, friends or neighbours. The increasing employment rate in Europe, specifically among women, is leading to a situation in nearly all countries where more than half of carers of working age combine their care responsibilities with employment. Nevertheless, a significant proportion of carers are also excluded from employment by their care responsibilities – with impacts on pensions as well as current incomes. Altogether, 6% to 10% of employees are providing regular care, with higher rates among older (female) workers.

This contribution of informal carers is beginning to attract more attention – and some acknowledgement – in the documents and debates of the European Commission, the Parliament, and the Council. Much of this interest has been prompted by concerns about the costs of care and the need to sustain informal care. However, there is also an imperative to increase employment rates, associated in part with the need to sustain pension systems. Reconciliation of care with paid work is a key element of both these debates, as has been highlighted by the European Parliament Interest Group on Carers.

The EU 2020 strategy has underlined the significance of population ageing as a key long-term challenge, (and it should be recognised that the workforce is also ageing). The goal of smart, sustainable and inclusive growth means that "access to childcare facilities and care for other dependents will be important ... Equally important will be our ability to promote a healthy and active ageing population". In their response to the 2020 strategy the European Parliament has emphasised the need to "help workers combine employment with care needs"<sup>2</sup>. Growing attention to long-term care inevitably must refer to the role and contribution of informal carers although there has been a lack of significant and explicit attention to the policy implications for social protection, equal opportunities and employment.

On 1 October 2010, the UK Government has introduced new legislation to combat discrimination against carers in employment. While carers benefit from the income and social contacts associated with paid work many have also experienced significant disadvantages with regard to career development and promotion, access to training and skills development. They have been exposed to negative assumptions about their productivity and capacity to manage employment alongside care responsibilities. Although this suggests that employers will seek to redress the difficulties experienced by some carers there has in general been a lack of specific action in the workplace to support working carers. Some companies have, though, begun to offer support to their employees with care responsibilities, generally recognising the business case for doing so; that is to say reducing costs associated with turnover and recruitment, absenteeism and ill-health, and capitalising upon the skills, expertise, and motivation of their workers.

There has been relatively little development of social dialogue or collective agreements on reconciling work with care, apart from care of children. Most company level measures appear to be the result of individual businesses recognising the benefits for workers and for the organisation. The most common company measures are built around flexibilisation of working time arrangements, including short and emergency care leave. However, some organisations are offering additional leave or part-



payment of such care leaves. In new research at Eurofound, companies have been identified who go beyond the traditional working time considerations to provide services that support workers in their care responsibilities, for example, through developing information or counselling services and even in helping employees to organise or to provide care. However, such organisations cannot be found in all sectors of employment, nor are they easy to identify in many member states.

In workplaces there is a need to raise awareness, not only of the difficulties facing employees with care responsibilities, but also of the advantages and feasibility of improving the situation. Where positive measures exist, it is essential to provide encouragement and support for carers to take advantage of the initiatives – many carers are reluctant to call attention to themselves, or consider their care responsibilities as a private matter, or feel stigmatised by the label of “carer”. The support of line managers and colleagues is critical but also the elaboration of more explicitly supportive policies and collective agreements.

At EU level there is a continuing need to promote awareness and active recognition of the contribution made by carers and its importance in the European model of society. Clearly, the role of community services is very important in enabling carers to work, and there are massive differences between member states in their relevant welfare systems. The situation of working carers needs much more extensive documentation, particularly because in the majority of member states there are huge gaps in knowledge. While no EU labour legislation has been addressed to the specific needs of working carers there could be opportunities for actions to protect employment and promote equal opportunities for carers in employment – including a role for social dialogue as well as for employment or social protection policies. Further opportunities for use of the Structural Funds should be explored and the various mechanisms for the sharing of best practice could look at ways to provide effective support for working carers.

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- 1 *EU KOM – European Commission (2010): Europe 2020. A European strategy for smart, sustainable and inclusive growth. Communication from the Commission COM (2010) 2020.*
- 2 *EU Parl-European Parliament (2010): European Parliament resolution of 10 March 2010 on EU 2020-strategy.*

## Sociopolitical Developments in Europe

### The Belgian career break system

The system of career break was introduced by the Belgian government in 1985. It allows employees to reduce working hours or to interrupt their employment for a specific period, during which a state allowance is paid. During the leave period the employee is protected against dismissal and receives the guarantee to return to the same job.

Initially, career breaks were aimed at achieving a redistribution of labour to counter the rising unemployment. Each leave-taker was to be replaced by an unemployed person. Three additional forms of career break, referred to as thematic leave, were introduced in the nineties: career break for palliative care (in 1995), parental leave (in 1997) and medical care based career break (in 1999). At the beginning of 2002, the legislation on career breaks was reviewed, and became known as ‘time credit’ in the private sector and kept the name ‘career break’ in the public sector. The replacement rule for the general scheme was withdrawn, the emphasis today being on increasing the quality of life by facilitating a better combination of work and private life. The thematic leave forms of career break remained unchanged. The general schemes of career break and time credit exist alongside parental leave and are not to be confused. An EU directive stipulates all EU member states must provide at least three months parental leave per parent, while there are no EU regulations on career break.

Career break or time credit can be taken up across the life course by all employees working at least one year for the same employer, and is not limited to specific reasons for leave. All employees in the private sector have the right to one year of this type of leave, which can be extended up to five years by collective agreement on sector or company level and can be taken up

flexibly. Employment can be interrupted full-time or by half or one fifth. In the public sector career break can be taken up for a total of six years spread over the life span. Employees in the public sector can reduce their working time by one fifth, one quarter, one third and half or full-time. The state allowance is dependent on the take-up rate, age, household composition and years of employment. An employee younger than fifty with two children for example receives around €366 for a full-time break in the public sector, in the private sector up to €399. The Flemish Government offers an extra incentive premium (for employees working for Flemish organisations in Flanders and Brussels) when the leave is used to take care of dependent children or needy family members or to follow a course or study (between €110 and €160 per month for full-time leave). In case of reduced working hours due to company restructuring in the private sector the incentive premium amounts to €345. A special ruling is in place in the social profit sector, with higher incentive premiums, to encourage employment in this sector.

Parental leave in Belgium is an individual entitlement of three months leave per child for each parent till the child reaches the age of twelve. The leave may be taken full-time, part time over six months or one day a week for fifteen months. Leave for palliative care can be taken for one month, extendable to twelve months (full-time, half or one fifth). In case a family member gets severely ill, leave for medical reasons can be taken for one to three months, extendable to twelve months (full-time, half or one fifth). These types of thematic leave are paid depending on age and the take-up rate (approximately €653 per month for full-time leave). The additional incentive premium from the Flemish Government is also offered for these types of leave.

Since 2002, the use of career break and time credit by employees over fifty is stimulated through more flexible conditions and larger contributions. Over-fifties are allowed to work four fifths or half until their pension age with the aim of keeping these employees longer in the labour market.

The current policy intends to enable a more relaxed career and acknowledges the need for time across the life span for other activi-

ties than employment. However, it can not be neglected that these leave periods are also intended as a vehicle for the increase and lengthening of labour market participation. On the one hand the intention is to keep women with caring responsibilities in the labour force. On the other hand the policy aims at keeping older employees in the labour force. This implicit employment strategy is often criticised. While parental leave is generally accepted as legitimate, the possibility for older employees to reduce their work hours is criticised by the Federation of Enterprises in Belgium. The employment rate among over-fifties is particularly low in Belgium (49.1% in 2009) compared to the EU-27 average (56.5% in 2009). The costs of the career break system are regarded as too high, and the system is not adequate in encouraging older employees to stay longer in the labour force. At every new government formation, the system of career break and time credit are under debate. The high take-up rate among younger women and older men, however, proves the felt need among employees to better balance work and private life. Career break and time credit are seen as a social right and taken in defence by the trade unions.

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## Background Information

### “caregiver leave”

### The current legal situation in Germany – the Caregiver Leave Act

The Caregiver Leave Act (Pflegezeitgesetz, Pflege ZG) came into force in Germany in June 2008. Since then, all employed persons in Germany have had the right to interrupt their work for a short period of up to ten working days to organise suitable care for a close relative (e.g. parent, grandparent or child) in acute and sudden need of care, or to provide the care themselves. During this short-term leave, employers are not, as a rule, obliged to continue paying the employee's salary, unless con-

tinued wage payment is explicitly regulated by law or by an agreement (e.g. in a collective wage agreement). Persons in Germany who are employed in a company that has more than 15 employees are also entitled to leave of absence of up to six months in order to look after a close relative in need of nursing care in this person's home environment. Here again, the Caregiver Leave Act does not provide for continued payment of wages. Employees are covered by special dismissal protection from the time of notification of the short-term absence from work or caregiver leave until their return to work.<sup>1</sup>

### Reform proposal of the German Federal Minister Kristina Schröder – “family caregiver leave”

In May 2010, Minister Kristina Schröder rekindled the debate on caregiver leave with her proposal to reform “family caregiver leave”. The new draft law on family caregiver leave would give all employees in Germany the right to a maximum of two years of family and caregiver leave. The reform would not only extend the duration of the leave, but also give employees the right to reduce their working time to 50% during this phase. At the same time, they would continue to earn 75% of their salary. At the end of the caregiver leave, employees would return to full-time work but continue to receive only 75% of their salary until their salary accounts are balanced.

The employer's risk of an employee not returning to work after the caregiver leave would be covered by an insurance policy.<sup>2</sup>

### Caregiver leave and other concepts:

In Germany, “caregiver leave” is understood as a legal provision that allows employees to take care of “close relatives in need of nursing care in their home environment”, thereby improving the compatibility of work and family care duties.<sup>3</sup> Family care in the context of the proposal also includes care for children who need special care.

The current European debate on improving the compatibility of work and care responsibility is based on a broader concept of “family”.<sup>4</sup> What is being discussed therefore are **working time and leave models** allowing employees

to care for “other adult persons”. In addition, there are member states, for instance Belgium, where employees have the option of taking professional leave not only to care for family members, but also to follow **other, non-professional interests**. (cf. Newsletter article by Jessie Vandeweyer and Ignace Glorieux, page 3)

### Online sources:

<sup>1-3</sup> *Current legal situation regarding caregiver leave in Germany:* Law portal “Juris.de” – Gesetz über die Pflegezeit (May 28, 2008): <http://www.gesetze-im-internet.de/bundesrecht/pflegezeit/gesamt.pdf>

“Family caregiver leave” as a special topic in the online magazine of the German Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (BMFSFJ)- “Im Fokus” no. 23 of 20 May 2010: <http://www.bmfsfj.de/mag/root-mai-23.html>

All about “family caregiver leave” on the website of the German Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (BMFSFJ): [http://www.bmfsfj.de/BMFSFJ/Service/themenlotse\\_thema=thema-familienpflegezeit.html](http://www.bmfsfj.de/BMFSFJ/Service/themenlotse_thema=thema-familienpflegezeit.html)

Web portal of the European organisation representing the interests of caregiving relatives – EUROCARERS: <http://www.eurocarers.org/>

### Further literature:

*European study on care arrangements in Europe:* The objective of the study is to show how care responsibility is shared within families in the member states of the EU and what socio-economic effects these care arrangements have. Glendinning, Caroline/Arksey, Hilary/Tjadens, Frits/Morée, Marjolein/ Moran, Nicola/ Nies, Henk (2009): Care provision within families and its socio-economic impact on care providers across the European Union, Research Works, 2009-05, Social Policy Research Unit, York: University of York. (available on the Internet via [www.eurocarers.org](http://www.eurocarers.org))

<sup>2</sup> *Pros and cons of the family caregiver leave draft legislation in Germany:* an overview of the current legal situation and the planned draft law on family caregiver leave; arguments for and against, open issues: Deter, Gerhard/Ragu, Mareike

(2010): Aktueller Begriff Familien-Pflegezeit. Wissenschaftliche Dienste des Deutschen Bundestags

Nr. 26/10:

<http://www.bundestag.de/dokumente/analysen/2010/familienpflegezeit.pdf>.

*Information about caregiving relatives in the EU for decision-makers in politics and organisations – focusing on long-term care for older people:*

Tjadens, Frits/Visser, Geraldine/Sangers, Sandrina (2008): Family Care in Europe. The contribution of carers to long-term care especially for older people, Eurocarers, Utrecht.

<sup>4</sup> Cf. EU COM – European Commission (2010): Europe 2020. A European strategy for smart, sustainable and inclusive growth. Communication from the Commission Com(2010) 2020.

### Note

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